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How the selective hair-care brand Redken in Italy can co-create both with hairdressers and consumers to build the salon experience of the future?

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Abstract The scope of this paper is to analyse the current dynamics adopted by the professional hair-care brand Redken in Italy, and how it can leverage on hairdressers and final consumers to co-create the salon-experience of the future. Qualitative interviews were conducted with hairdressers and managers, while consumers participated also to a quantitative questionnaire. The research demonstrates that the Brand is co-creating well with part of the hairdresser, which, in turn, co-creates the salon experience with customers. Other hairdressers are not able to make the relationship valuable. Finally, it seems to be missing a direct interaction between the brand and consumers.

Keywords: Co-creation, Customer Experience, Brand Management, Redken

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1. Introduction

The continuous technological development that the modern world is recording in last years, has radically transformed the way in which companies interact with customers and business partners. Customers' expectations and behaviour have also changed, shifting in their role from "passive audiences" to "active players" and becoming central and fundamental for the success of the company (Prahalad & Ramaswamy, 2000). Firms are no more just "producers" but need to develop specific value propositions with consumers to meet their specific needs (Vargo and Lusch, 2004).

Co-creation is today a very important topic in all businesses, and specifically in dynamics industries such as the beauty one, in which customer experience is "where the sale is won or lost, where the brand comes to life, and where the seeds of loyalty are planted." (A. T. Kearney, 2012).

I'm currently doing an internship at Redken Italy, a professional hair-care Brand, managed by L'Oréal Italia Professional Product Division. The professional hair-care market in Italy is living a stagnant phase, where all the brands struggle to grow. It is a main concern for managers to raise co-creation within brand hairdressers and consumers to improve the salon experience of the future, in order to sell more and better.

2. Contextual background

2.1. What is co-creation? From a Goods-Dominant-Logic to a Service-Dominant-Logic

In 2001, Norman developed the concept of co-production, based on which different operators and actors replace the single producer, and the consumer is no longer placed at the end of the production process but is conceptualized as co-producer of value. This optic changed also the relation between the firm and the consumer since we are now not talking anymore about the single output but about a process of value creation. The distinction between producers and consumers is becoming blurry and less clear.

During the last years, both in the market and in the academic world two main concepts have been opposed, the *goods-dominant logic* and the *service-dominant logic* (Vargo and Lusch, 2004).

This debate finds its foundation in the studies of Vargo and Lusch (2004). The authors explain how in the last 100 years "marketing" and the whole industry concept "has moved from a goods-dominant view, in which tangible outputs and discrete transactions were central, to a service dominant view, in which intangibility, exchange processes and relationship are central" (Vargo and Lusch, 2004, p. 2).

Since the industrial revolution, goods have been the unit of exchange: the scope of the manufacturer economic activity was "to make and distribute things that can be sold" (Vargo and Lusch, 2004, p. 5). Goods were seen as a resource while the customer was the recipient of this resource. In this optic, the value was "embedded" in the good itself, determined by the firm and defined in terms of "exchange-value": a good at the moment of exchange becomes a value for the consumer for which he pays a price. It is clear that this way of analysing a complex reality as the enterprise one and the interactions with the great variety of actors with which it comes into contact, can only be part of a past period where the consumer was totally aloof. Therefore it is no longer adequate to investigate the way in which companies operate and relate to the environment of which they are themselves an integral part.

The progressive affirmation of the difficulty of separating service activities from the production of goods and the spread of the importance of services in many industrial realities for the purpose of differentiating the offer, have posed at a later stage several questions that have found answers in the attempts to expand the areas of reference and extend the concept of service to the generality of companies (Grönroos, 2008).

In what can be defined as a "Manifesto", Vargo and Lusch underlined the distinction between *operand* and *operant* resources. *Operand* resources are those on which it is necessary to realize an operation to produce an effect, while *operant* resources are those that need to be "employed to act on operand resources". Furthermore "operands" are usually tangible and it's easy to identify an action or a process on them, through the usage of the "operants" ones which are intangible skills (such as technology or knowledge) that make the transformation into outputs (Vargo and Lusch, 2004). Firstly developed by Constantin and Lusch in an older publication, this dichotomy is fundamental and plays a determinant role in the development of the new "service" way of thinking. The firm is not anymore seen as a commercial entity which simply produces and stocks outputs, but it is the subject who 1) develops "core competences, the fundamental knowledge and skills" representing its "competitive advantage", 2) identifies potential consumers who "could benefit from these competencies" and 3) establishes and cultivates relationships with consumers to reach the final purpose of developing with them specific value propositions to meet specific needs (Vargo and Lusch, 2004, p. 5). This service-centre view is customer-centric since it involves the collaboration with consumers to meet individual needs; It implies the customization of the offer to recognize that the consumer is always a co-producer and to maximize consumer involvement in the customization to better fit his or her needs (Shah et al., 2006).

Christian Grönroos, further explored the role of the firm in the value creation processes, following the challenges posed by many contributors to the academic literature for what concern the creation of value in the sphere consumer and its processes, rather than as a result of actions of the supplier subject (e.g. Normann and Ramirez, 1993; Vargo and Lusch 2004).

The author underlined how the value is not embedded in the good itself, nor the "moment of exchange" is the locus of value creation. In his optic, the value is generated from the use and emerges from the actions the consumer decides to adopt (Grönroos, 2008). In the service logic, a firm provides a good or a service to consumers and when they use that resource and "add other resources" such as skills and information, the "value potential of the resources is developed into value-in-use": in other words, consumers are co-creators of value, since value is created when they use goods and services. Grönross argued that on one side, the value can be generated autonomously by the consumer (e.g. buy groceries to cook a meal), but on the other side value can be generated with the direct support of the firm with the use of the firm's knowledge (Grönroos, 2008, p. 303).

Here, the concept of interaction clearly emerges. The role of the firm is not only to develop a value proposition, but it needs somehow to communicate to the consumers the ways the latters can obtain that value. Suppliers need to provide customers "with the necessary resources for their value-generating processes" and thus consumers are part of this value co-creation path (Grönroos, 2008, p. 303).

In this thesis, we propose to use the definition of co-creation as a process that includes all the interactions between the services provided by the firm and the customer, which enable the latter to create value from himself.

2.2. Co-creation in a Business-to-Business Environment

The co-creation process implies not only the contribution of final consumers but also the one of potential business partners. In a B2B environment, the producer supplies a resource, whereas it is a product or a service to its customers, and there is a multitude of aspects under which this resource could be valuable or not for them. Value here does not emerge from the core product but from the "whole spectrum of supplier-consumer interactions […] that support a successful use of this core resource" (Grönroos, 2008, p. 270). In its everyday chain of practices, the consumer needs in fact the support from the supplier in order to successfully flow towards these activities and reach a profitable business. In the old goods logic the firm would provide just the product and will remain responsibility of the consumer to have the right resources to use it effectively and create value out of the purchased. In a service logic instead, the firm will maintains the responsibility to support the consumer in its everyday routines with an "extend offering" that must be able to create value out of the core process (Grönroos, 2011, p. 241).

2.3. The Retail and Consumer Experience

In the traditional economic world, the process of value creation was occurring inside the firm, with the external consumer perceiving it at the end of the supply chain. In this company-centric view, consumers had only the role of consuming and the market was just the place where the exchange takes place (Prahalad and Ramaswamy, 2004). In an increasingly mobile, social and multi-channel world, users' needs and behaviours are changing, while new opportunities for interaction and relationship with brands are created. The whole spectrum of interactions between the firm and the consumer is becoming crucial to develop a substantial competitive advantage (Bertorello et al. 2015). When a customer buys a service, he buys a series of intangible assets that are carried out on his behalf, but "consumers today have more choices of products and services than ever before, but they seem dissatisfied". Furthermore "firms invest in greater product variety but are less able to differentiate themselves" (Prahalad and Ramaswamy, 2004, p. 1). With the conceptualization of the so-called *Experience Economy* (Pine and Gilmore, 1998) together with the new disciplines introduced recently in the Marketing theory such as *Customer Relationship Management* and *Customer Knowledge Management,* we are assisting to a shift where firms are looking for a growing customer involvement (Brunetti, 2004). In fact, "informed, connected, empowered and active consumers are increasingly learning that they too can extract value at the traditional point of exchange" (Prahalad and Ramaswamy, 2004, p. 2). There is a need to move not only on the level of the relationship between the company and the customer and the different ways of involvement, but to act also right on the object of exchange, the element at the centre of the transaction, the "what" is offered and bought from the two parts, going beyond goods and services.

According to Pine and Gilmore, the “experience” is a new type of offer that is added to commodity (fungible materials), goods (tangible products) and services (activities intangibles), and so represents the “fourth economic offer” (Pine and Gilmore, 1998, p. 97; See **Appendix 1**). Experiences are memorable events that personally involve the consumer in the very act of consumption. In Pine and Gilmore’s optics the company becomes a sort of "experience director", no longer selling only goods or services, but selling also the experience that derives from them. An experience occurs when a company uses its services and goods as a stage to “engage individual customers in a way that creates a memorable event” (Pine and Gilmore, 1998, p.98). It becomes therefore increasingly important to customize the offer and establish a personal relationship with the customer: experiences are formed on a personal basis and involve personal values and thus are co-created with the consumer. For Prahalad and Ramaswamy this “co-creation experience” is the base for value creation since the high-quality interactions that gives the consumer the possibility to co-create unique experiences with the company, represents a unique competitive advantage (Prahalad and Ramaswamy, 2004). The company needs therefore to set the stage of the experience and create an environment that can enable consumers to create their own personalized experience. *Customer Experience* can therefore be defined as the experience lived by the consumer around the interaction with products and services offered by the firm, not only considering the rational actions of the purchase decision but involving an hedonic component that include sensorial feeling, emotions and relations (Zarantonello, 2005).

Thus, the experience co-creation can be defined as the process lived by each consumer when in the unique context of each interaction with the touch-points and the stimuli provided by the company, he develops and designs his own experience. This focus on experiences has also modified also the traditional role of store that cannot be seen anymore as a place with a merely logistic function, but as a place that should stimulate consumers, being the place of privileged contact between a brand and consumers, carrying all the potential for value creation.

2.4. The hairdresser market in Italy

The hairdresser market is the branch of the beauty industry that deals with all the consumable salon hair care products sold to professional salons for back-bar and take-home products. Back-bar products are defined as products used by hairdressers for services performed in the salon. Take-home products, which represent salon retail products, are defined as professional hair care products sold through professional salons to consumer for use at home. The market is made up by four main categories of products: Shampoo, Conditioners, Hair colouring, and hair Styling products. Before the severe economic crisis that hit the country in 2012, the hairdresser market in Italy was valued 521M € (L'Oréal, 2017). After a big drop in 2013 when the market registered a -6% decrease, in the last three year it has seen a modest but constant grow, reaching in 2017 a value of 518M €, with a 1,9% growth from 2016. Hair colour is the largest product category in the market, that accounts alone for more that 50% of the total sales, followed by hair care (35,8%) and hair styling (14.4%). In terms of growth shampoos and conditioners represent the fastest growing category with a +3% compared to 2016 (L'Oréal, 2017).

Even if the market is recovering and going back to pre-crisis figures it is still not healthy, with the number of woman visiting hairdressers, the number of visit per woman and the average spending that are decreasing (L'Oréal Brandstorm, 2018). The women's salon penetration dropped from 2010 when it was 80%, at a -1,1% CAGR till 72% in 2017, with the frequency of visits per year dropping from 8,8 in 2010 to 7,6 in 2017.

What is not changed much during the last 5 years is the competitive landscape of the market. L'Oréal Italia is by far the leading player in the salon hair care market, with a market share of 27,8%, followed by Coty Inc. with 14,3% and Revlon 4,7% (L'Oréal, 2017).

Regarding distribution, sales are made mainly by direct distribution through company sales representatives within the 90 thousands professional salon in the country. Furthermore larger salons and chains tend to have supply agreements directly with brand and suppliers.

As reported by *Il Sole 24 Ore*[1] from the same newspaper, even if the market recovered in the last years, it is still not in a flourish situation: prices are increasing, but the average number of employee per salon is 1,7 underlining a sector that is experiencing a series of critical issues that penalize those salons unable to renew themselves following the changing needs of customers and new technologies. Six out of then salons are in fact in a huge crisis, three are able to survive and only one out of ten is able to grow, acquiring new clients and increasing the average fiche.

2.5. Redken

a. History, vision and Brand Identity

Redken is the pioneer, edgy, innovative professional hair care brand known throughout the world for effective and targeted formulation in total respect of the physiological pH of the hair. Redken products make up an alternative urban line, always faithful to the New York style and always in step with fashion.

Redken history begins in Los Angeles, late 50s. The young actress Paula Kent was undergoing frequent chemical treatments and look changes, to be at the top on Hollywood's sets, but she was facing a problem: her hair were baby fine. She visited dermatologists and hairdressers to find a solution, but no one could explain to her the science behind the products. She figured out that professional hairdressers needed to be educated on the

[1] Economic and financial Italian Newspaper.

chemistry of hair and product ingredients. Together with her hairdresser Jheri Redding, who was also a chemist, and $3000, she started with three products and an intensive training program for hairdressers on skin and hair chemistry.

In 1960, the Redken Laboratories were born, pursuing a precise philosophy: beauty through science, revolutionizing the professional hair care industry for both stylist and consumers. In 1970 Redken introduced science and business education to hairdressers and in 1974 hold the first Redken "Symposium".

Redken revolutionized the hair colour, in 1983 with the launch of Shades EQ Gloss, the acid pH colouring, which, with its unique and original formula and its high conditioning features, changed forever the world of professional colouring.

In 1993 the company is acquired by L'Oréal and relocated in 5th Avenue New York City, repositioning the brand as an inspirational, urban and fashion trendsetter. The brand thus sees a strong presence in the backstage of the fashion shows with the best designers of the most important Fashion Weeks around the globe.

Today Redken is a world leader in the sector of professional hair products and services, supported by talented managers, strong partnerships with the best hairdressers around the world and a constant and tireless research of the highest level.

b. Current dynamics in Italy to build the salon experience of the future

Redken is managed by the "L'Oréal Professional Product Division" (PPD Italia). Together, they have always wanted to be pioneers in the market. With the raising importance of the customer centric approach and the changes that are shaping a new customer journey, they are working every day to shape the future of the salon experience, with the consumers at the centre of their strategy. However, in the last 30 years, professional salons have not changed, remaining "outside" from the evolutions that happened in the market and not aligned with the new need of consumers that nowadays are more informed and demanding than ever.

Furthermore a research conducted by PPD Italia demonstrated that, consumers are going to the hairdresser reluctantly, living the experience more as a duty than as a pleasure. The market figures confirm that the number of women going to hairdressers is decreasing and average expenditure that is decreasing too. When asked where they would spend a present of 100€, only one woman out of four would chose to spend it a hairdresser salon. To fight this trend, in 2014 the "Salon Emotion" was launched (SE), a pioneering program which aims to support the development and transformation of the hairdressing industry. Based on three essential components, training and raising awareness of services, personalized advice and guidance to modernize the salons, and making financing simpler, the project took off in France with 40 pilot salons and aimed to renew 6000 salons in Europe by the end of 2018. Salon Emotion has its roots in the in-salon customer journey and identifies 7 steps to elevate the consumers' experience inside the salon: Window, Reception, Consultation and Diagnosis, Back Bar, Technique, Shopping and Check out. Each of these steps is then defined and allocated in a specific space of the floor pan, to create a unique experience journey that starts in the street and ends at the payment (**Appendix 2**). Salon Emotion, beside the possibility of the restoration of the salon that it gives, is a mind-set: it comes with tailored education courses where all the employees are trained to embody the SE mind-set, including the "does and don'ts" to valorise the experience in each of the steps and discover where they need to improve, as well as courses on the organization of retail spaces. Italy went a bit further in the development of this concept, partnering with *Samsung Italia* and *Matta&Partners* an architecture and design studio, adding digital technology to four of the seven steps and developing what they call "*Salon Emotion Digital 2.0*".

> "Salon Emotion 2.0 is a project that has the objective of innovate and make even more enchanting the experience of consumers inside the beauty salon […] by the renovation of the entire customer journey, not only in terms of restyling, as the new look we are lending to the salon, but also with the introduction of technology and tech devices that make even more interactive the steps of the consumer within the salon" (PPD Digital Retail Manager, L'Oréal Italia).

The first tech-touch point is the shopping window, which is usually bare and poor with non-attractive and steady paper billboards. In the SE it is equipped with Samsung LFD screens that broadcast institutional and call to action videos that inevitably capture the attention of the consumer. Furthermore thanks to a near field communication technology they are able to communicate targeted messages to consumer who passes in front of the sensor, with a result of +600% visibility and +30% of new consumers entering the salon (L'Oréal Brandstorm, 2018).

The impact of digital technology is even more important in the central and operational part of the journey, which ranges from consultation to shopping. After the reception in fact, the consultation takes place: in this step, the hairdresser or the colourist starts a conversation with the consumer to understand his/her needs. With the Redken consultation App that works as a diagnostic tool, they discover together, based of the types of hair, wishes and lifestyle which service suits the best. The third element that has been implemented is in the retail area with the "*Digital Retail Manager*", a screen with a barcode reader. The consumer is now free to know more about the products and evaluate the purchase, with videos, descriptions, best practices and prices. A detailed service is a guarantee of performance for the customer, but also for the operator (i.e. hairdresser) who is sure to respond to needs and to experiment with a new form of loyalty. The journey ends with a selfie-station where the consumer can share the results on social networks, increasing also the notoriety of the salon itself. Besides the increase of new clients, services and treatments sold, the salons that have joined the project had seen an average increase in the retail sell-out of +25% in the first year[2].

Education is the second pillar of the brand and the main link between the brand and the hairdressers. Redken is committed in the support and empower of their "tribe" to "learn better, earn better and live better" (Redken, 2018). The brand believes in a personalised

[2] Salon Emotion Business Presentation. Please note that the growth slows down to +16% in the second year.

approach to education, to elevate the expertise of the staff of their salon, to increase salon earnings, improving the lives of all their customers. Each year the Redken Education team together with the Redken Artists[3], organise an intense education programme, with hundreds of classes on colouring, cut, design, and inspirational events. Alongside the "technique" classes, the brand provides support to their salon in a wide range of activities, offering also business education on how to grow their business. This unique approach to education provides professionals with the most advanced skills and tools they need to guarantee the best salon experience for their consumers.

3. Addressing the Work Project Topic

This chapter addresses the Work Project objectives. We present the research design and the selected methodology, then describe the studies conducted. Finally, we present the main research insights.

3.1. Methodology

In order to explore consumers' attitudes, preferences and emotional involvement concerning the actual salon experiences as well as what the counterpart (hairdresser, salon owners and managers) is doing to offer the best experience and to enhance their relationship with their customers, we used a combination of several methods:

Table 1. Overview of the Research Methodology

Consumers	19 qualitative interviews and 93 quantitative questionnaires
Hairdressers	6 qualitative interviews
Redken /L'Oréal Managers	5 qualitative interviews

In-depth semi-structured interviews, based on a pre-recruiting questionnaire and an interview guide, were conducted with consumers, hairdressers and managers. In-depth semi-structured interviews are conversation with a cognitive purpose and guided by the interviewer, based on

[3] Specialised Hairdressers who get Redken certification and provide advance training to salon professionals.

a flexible and non-standardized scheme (Brand Management Course, 2018; Patton, 1990). This method helps to gain insights and underlined individual perceptions, patterns and emotions that wouldn't be captured through a quantitative method (Patton, 1990).

The research took places between November and December 2018. The pre-recruitment questionnaires for consumers (see **Appendix 3**), hairdressers (see **Appendix 4**) and managers (see **Appendix 5**) were rolled out at the beginning of November, mainly through direct contact and social media. In parallel, an interview guide was developed, including a warm-up introduction, the initial question and the pre-defined topics to be explored during the interviews (see **Appendix 6**, **Appendix 7** and **Appendix 8** for the interview guides). Starting with consumers, the first filter was a target age between 25 and 35 (Millennials generation) for two main reasons. First of all, Redken consumers are on average younger than consumers of other professional hair care brands[4] and one of the main priorities for the brand at the moment is to enlarge its "tribe" using digital tools[5]. Furthermore as reported by Eventbrite, Millennials are driving the experience economy (2014). Moreover, we needed to be sure the interviewees had a vivid memory of the experience he/she had in the salon with a temporal filter (filter 2) and that he/she goes to a hairdresser who uses an hair care brand from L'Oréal (filter 3 and 4; list on **Appendix 9**) to ensure that he/she is involved in the professional hair care experience. We conducted 19 interviews either face-to-face or via Skype, all with Italian consumers, which lasted between 21 and 56 minutes (Interview Codes in **Appendix 10)**. Each interview has been recorded with a mobile phone or with a laptop and the most important parts and sentences have been translated and transcribed, informing the consumer in advance about it and ensuring him/her that all the outputs would be kept anonymous. The same has been done for the 6 hairdressers and the 5 managers. Hairdressers needed to be to be Redken clients and to know the brands operating dynamics, while Managers needed to work at

[4] L'Oréal internal data.
[5] It's a given fact that younger generations are more tech-savvy than older ones.

Redken for at least two years. The interview codes for the two groups of interviewee can be found respectively in **Appendix 11** and **Appendix 12**.

Finally, with the inputs obtained from the interviews, an online questionnaire has been developed for consumers, to better understand on a quantitative and larger scale, what are the most important elements that shape the salon experience and what should be improved (**Appendix 13**).

3.2. Research Insights

a. Consumers' Insights

The purpose of the consumers' interviews was to explore the attitude towards hairdresser salons and how the experience is lived. A preliminary insight from the interviews is that it seems clear that there is no "standard" consumer in the professional hair care category and that there are as many customer journeys as many customers interviewed. Through the analysis of the interviews, it has been possible to identify three different groups of women consumers based on 1) their attitudes toward the salon, 2) usage of social media related to hair and beauty world, trends and product information and 3) their usage of professional products (i.e., products purchased in the Hair Salon) at home in order to understand what they value and what they don't like in the salon experience.

The following table presents the 3 groups identified:

Table 2. Consumer Segments identified.

	Attitudes towards salon	Usage of social media related to hair	At home maintenance
Fashionistas	Beauty addicted	High	High
Escapers	Cuddle time	High	Low
Simplicity Lovers	Necessity	Low	Low

Source: Thesis Author based on the consumer qualitative interviews

Fashionistas. This first group of women can be defined as “beauty addicted” with a high emotional involvement. This kind of woman is self-confident, edgy with a bold attitude. She loves to appear and to be noticed and she goes to the salon with a high frequency (once a month or more) to reinvent herself, to change and to be constantly on trend.

> “I am an aesthete, I really like to take care of myself and I love to be perfect. Even If I’m not going a lot to the gym, I’m going to the beautician and to the hairdresser every time I can”. (Interviewee 1)

A second dimension that groups these consumers is their attitude towards social media. They are digital-savvy and they use social media to check every user-generated content: they follow bloggers to find inspiration and trends and they look for products’ reviews on blogs and forums. They are constantly connected, sharing opinions and reviews on products used, they tag brands and the salon in the pictures they upload on social media.

> “Instagram is irreplaceable; I follow bloggers, celebrities and normal people to find advice about hairs and trends”. (Interviewee 18)
> “I love when brands ask my opinion. Sharing my experience with them is fundamental, I feel listened and valued.” (Interviewee 19)

Finally, they spend a lot of time taking care of their hair at home; they often buy products at the hair salons.

> “I can really feel the difference on my hair compared with products bought at the supermarket, they are more expensive but they worth it”. (Interviewee 16)

Escapers. These women are on average older than the first group and most of them work. They usually don’t have much time to go to hairdressers or beauticians but they don’t turn down their beauty and the care of themselves. When they manage to go, they prefer to take half a day to get cuddle. They love store experiences.

> “I never do it at home: I want to have some pampering. This means giving myself the luxury experience of someone doing something for me”. (Interviewee 3).
> “When I’m there I just don't want to think about anything in not about how beautiful I will feel after” (Interviewee 4)

As the “Fashionistas”, they use a lot social media both for inspiration and to discover new services and treatments.

> “We discussed hair colour and I asked about a product that claims to treat hair as well. Then I showed a picture that thought my hair look could imitate.” (Interviewee 11).

They do buy products as well at the hair salon, but less than the "Fashionistas" since they do many treatments when they are at the salon. Most of the time they simply buy what their hairdressers suggest.

Simplicity Lovers. The principal point of difference between this last "persona" and the previous ones is that "Simplicity Lovers" don't see the salon as a place where they love to go, but more as a necessity and if they have to pamper themselves they would choose other kind of places. Furthermore they don't spend time looking for products' information, since they not really see a difference between one salon and another one. Furthermore they spend little time to take care of their hair at home[6].

> "I think in general it's nice when you are there, but I avoid it as long as possible. It's boring and time consuming. When my hair just hands there and I look ugly, then I go" (Interviewee 8).

There is a dominant opinion that is shared by the three groups of consumers: they hate to wait, they feel often bored and hungry and they would like to have additional services to optimise the time spent.

> "I'm always hungry there, and treatments could be 4 hours long, and I need something else besides journals" (Interviewee 1)

Furthermore, all interviewees valorise to be "heard", "understood" and treated personally. A "detached hairdresser" is a shared problem in the market, as confirmed by L'Oréal internal data, reporting that 60% of salon guests still feel they are treaded impersonally (L'Oréal Brandstorm, 2018).

> "I love when they offer me something more than a coffee, or when I can choose, between different teas or juices based on my taste, not everyone likes coffee" (Interviewee 2)
> "When I enter we always sit apart, we talk about my hair and what I would like to do. […] I really fell important and that my need are heard." (Interviewee 12)

Finally, not surprisingly, all salon consumers love experiences and entertainment.

> "When I went B.M. (hairdresser 2) I could watch "I love Shopping" with an iPad while they were doing my hairs, that was such an experience" (Interviewee 10)

[6] Please note from the interview codes appendix that three out of five "Simplicity Lover" didn't use any professional products at home.

Our quantitative online questionnaire to consumers allows us to confirm the qualitative insights presented above. For example, when asked (question 2.4; see questionnaire on **Appendix 13**) how the hairdresser characteristics gained from the qualitative interviews are important, 86% of the respondents think that the service and "be treated in a personal way" are important, 82,2% think that the punctuality of the hairdresser is important and 76,4% think that the atmosphere and setting of the salon is important[7]. On the other side when asked (in question 2.7) what they think should be improved, 35% of the respondents said that the "hairdresser as a consultant" should be improved, 31,9% selected the in-salon entertainment, 30,8% the booking system and 27,5% additional services such as food and beverage and the same percentage for the opening hours[8].

b. Hairdressers' Insights

The objective of the interviews with hairdressers was to explore what they are currently doing to provide the best possible service and how they use the "voice of consumers" to achieve their objectives. Furthermore, we wanted to investigate if and how Redken is helping them in the creation of the experience and in the delivery of a better service. We conducted 6 interviews, with 5 salon owners and 1 employee; 1 salon is a Salon Emotion 2.0. All the hairdressers showed a high entrepreneurial and customer centric-attitude. They consider that they are focused in listening their clients, who often have "not explicit" needs, in order to indulge them and to co-create with them the best experience. Even if they didn't formally joined the Salon Emotion program, they do a "consultation" every single time, even to frequent consumers, since the hair situation changes over time.

> "When a customer comes here she has a need, but 99 times out of 100 is never explicit. She fixes the appointment for a hair-set when maybe she would like to cut them or just to feel them softener. The ability to listen during the consultation is essential to understand what the real need is. During this moment we propose a path to get an optimal result. Then based on what the customer can in terms of time

[7] Please note that these percentages represent answers given for 5 or more in a scale from 1 (not important at all) to 7 (extremely important).
[8] Please note that these percentages represent answers given for 5 or more in a scale from 1 (I'm satisfied) to 7 (it absolutely needs to be improved).

> and expenditure we decide together whether to do everything immediately or divide the service in the various appointments, we co-create and we schedule the whole service with her." (Hairdresser 2).

Interviewed hairdressers pointed out that consumers changed a lot in the last years as consumers today look for a 360 degree consultation: According to the hairdressers, consumers build a trusted relationship with their hairdresser and ask for advice for everything connected with their look.

> "Our [consumers] are very heterogeneous, I have teenagers, girls in their 20s, women in their 40s, 50s and even older ones. But they come all here because they know that they will receive a fresh and modern service, they are not going to a hairdresser that thinks only about hair, we think about a total look." (Hairdresser 1).

Interviewed Hairdressers believe that also women nowadays have little time available to dedicate to themselves and this is changing they way they are working.

> "They love to be pampered […] but once they were scheduling these things and they were staying hours in the salon, now they can just one hour a week, and we need to be ready for smart and fast services. You do the same service but in a different way. The voice of the clients is essential if you want to retain them. You can do an awesome cut, an amazing colour, but if you are making here exiting one hour late and she arrives late to her appointment or she has her children to catch up, you are creating stress and anxiety, and that what she feels and remind not - look how beautiful I am and how good I feel -" (Hairdresser 3).

Hairdressers want to pamper their customers to make even a one-hour service turning into an amazing total look experience. Customers in these salons can find a variety of food and beverages, entertainment and additional services such as hand massages, nails and a make up, most of the times included in the price of the service to create memorable events.

> "Together with the hair-set we offer a quick make up and a hand massage. Do you have any idea on how many blood vessels are on hands? The massage creates a peerless state of relaxation." (Hairdresser 4).

A barber interviewed has solved the problem of time limitation affecting consumers by extra-time opening hours, aperitif included.

> "I got this idea talking with a consumer, for whom it was becoming harder to find a slot available that was fitting with his busy working schedule. I tried, and I've been able to serve additional clients that were not able to find this service in any other barbers in town. They come here, their day is over, they just need to enjoy a fresh and cold beer, and we will think about the rest." (Hairdresser 5).

For what concern the brand perception, it emerged from the hairdresser interviews that Redken is participating in the creation of the experience mainly through training and education. On one side, all the interviewees show a positive attitude towards the Redken Education Program. The brand courses are celebrated for the expertise of the educators and their internationality and are helping hairdresser both to gain the technical skills to deliver a higher-level service and to inspire their creativity with fresh new looks and trends, improving the customer experience.

> "I've participated in the past [to Redken education classes] and I am now enrolling my employees to these courses, we schedule the calendar together at the beginning of the year based on their level of expertise and the skills they still need to acquire and they are specializing in one specific service […] This helps us a lot in the delivery of a very high-quality service that reflects the needs of our clients. Redken is making this possible offering a wide range of courses based on expertise and category." (Hairdresser 2).

Redken is also perceived as having a good marketing and communication: products are well advertised in magazines and online:

> "It's a brand that creates buzz around it" (Hairdresser 1)

According to the interviewed hairdressers, a salon is recognized also for the products it sells, but first of all, the consumers need to recognise their own lifestyle in the salon's one.

> "Consumers comes here for me, for my staff, the environment. We make runways shows, I'm a Dj, one of our girl is a model […] consumers feel involved in our style, and this is what really matters." (Hairdresser 6).

On the other side, these hairdressers feel that sometimes the brand is not aligned with their needs. Redken includes in its commercial deals materials that are not considered useful.

> "They fill us with big posters, small ones, shelf talkers, window's decals, but these doesn't belong to us. I am an entrepreneur, I want people to remember my brand, I want to enter in consumers mind for a trendy salon that use awesome quality products, as Redken ones, not as a Redken salon, where our name is in second place. It's like if Redken would be recognised simply as L'Oréal brand an not a brand itself." (Hairdresser 6).

Finally, two hairdressers are starting to perceive the Brand as focusing too much on its own business instead on the "real" needs of their salons.

c. Managers' Insights

By interviewing Redken Managers, we wanted to explore how Redken is acting towards hairdressers and consumers, and how they are incorporating the voices of consumers and hairdressers in their strategy. It emerged from the interviews that Redken, besides the traditional market researches, is trying to shape the future of professional salon experience towards two principal dynamics: Education and Salon Emotion.

Until some years ago, Education was only technical. There were cutting, styling, colouring classes and hairdressers were participating to enhance their practical skills and scout new trends. In the last years, this orientation has changed with the necessity to communicate and to listen more with the consumers.

> "In our classes, we talk about products of course, but we are trying more and more to teach them [hairdressers] how to propose it to the consumer. Educating the hairdressers means enable them do a storytelling around the products and transform them in services. They need to stop to talk just about the product names, but to utilise words that evoke the result obtainable and make consumers desiring that result and accepting what is the sales proposal" (Manager 1)

Education now aims at teaching hairdressers how to create the right environment that goes beyond the product itself. Hairdressers are not just learning a product application, but they learn how to make of the service "a ritual": pampering the consumer and creating an experience. A clear example is what it should happen during the consultation, where empathy and emotional involvement are fundamental:

> "Through *Principles of Consultation*[9], Redken hairdressers are not just doing a consultation on the colour the consumer would like to have, if it's cold or a warm, if it fits with the skin tone or the colour of the eyes, but they are asking question about the lifestyle, temper, work, to know the consumer and to understand if they need to work to obtain a final result of coherence or resonance of these characteristics". (Manager 1)

The voice of consumer emerges in a clearer way in 1) how classes are developed and 2) how they are structured. First of all, Redken Artists are reporting directly to the Education team:

> "Each one of them as at least 300 consumers, so we have a panel of around 9000 consumers that are listened and served directly by our educators. When they invent or propose a service in a new way, they do it on the base of what they live directly with consumers, and we create new courses. (Manager 1)

Furthermore, during these classes, real consumers are invited as models. With the objective of experimenting what should happens in the salon, hairdressers "live" during the class the fact that they need to better communicate with consumers. At the same time consumers are giving feedbacks, some in real time, others, describing their experience at the end.

Salon Emotion (SE) is the second dynamic. The core of the project is to enable the consumer to live his/her own experience once in the salon. The experience starts outside and when the consumer enters the salon is helped on two different aspects: the excellent service provided by

[9] REDKEN consultation method and framework.

a perfectly trained staff, both from a technical and emphatic point of view and a top-notch organisation that allows the salon to "speak from itself", enabling the consumer to interact with the space autonomously.

> "Most of hairdressers have big limits in the relationship with consumers. Salon Emotion enables the salon to be autonomous. With the vertical communication, the consumer obtains all the necessary information to serve herself by her own. The horizontal exposition is even more fundamental. She can touch, smell and understand what is happening." (Manager 4)

Furthermore SE is a project that wants to "innovate and communicate as a category in a world that doesn't even speak of products. When we talk about a category we are for real customer-centric because it's linked to category needs" (Manager 4)

Despite those initiatives, REDKEN managers "feel" the hairdressers' perception of a brand that is not aligned with their [hairdressers] needs and more detached. Confirming what emerged from the interviews with the hairdressers:

> "We are a brand with a small structure, we try to elevate the sector, working on education but we do not have the strength to follow everyone in the same way. The hairdressers that follows us for two years should be treated in a different way from the ones that follows us since 20 years. The last ones need other things, legal, commercial, and marketing advises. The problem is that this group is still limited in number and we do not do many activities with them yet, but we focus on potential evolving salons, because they are more. [...] We need a sustainable education's portfolio education." (Manager 1).

4. Discussion on Co-creation

In this section, we confront the insights from our research to our literature review on co-creation:

The value proposition of Redken, "*Learn Better, Earn Better, Live Better*", could appear at a first sight oriented to hairdressers only. But it's exactly through hairdresser that Redken can co-create value with final consumers. Co-creation occurs when the brand and the salon make available tools and inputs, which when used by the consumer, he/she can create value for him/her self. To co-create, all the parts involved should establish a two-ways communication relationship within each part. The Brand should communicate with both hairdressers and consumers, while enabling these two to provide feedbacks. Hairdressers and consumers

should relate in the same way. Redken at the moment is still not able to co-create directly with consumers, since hairdressers are a mandatory link between the brand and its final consumers. From the research, it emerged that the brand is communicating well with the hairdressers that use and distribute Redken, even if some are still unable to understand and perceive an added value. Those with a higher entrepreneurial attitude, who have been able to acquire the concepts, are co-creating the experience with consumers. They utilise the inputs received during education classes, such as technical skills and customer centricity mind-set, to deeply understand the needs of consumers. Moreover, they are listening to their consumers, enhancing what they valorise and finding a relief to their [consumers'] pain-points in order to create the right environment. They organise spaces, provide additional services, such as massages, nails and make-up, with the support of entertainments, to make the salon "speaks by itself" and enable the consumer to co-create the experience in a world that he/she feels as own. On the other side, there are still hairdressers that represent and embody the stereotype of the "average Italian hairdresser", with a narrow mentality, adverse to change and unable to see a value for themselves in the "*Learn Better, Earn Better, Live Better*" claim of the Brand.
These hairdressers need to understand both the market and the consumer needs are evolving and that Redken can answer all these changes while creating a remarkable added value to their own businesses. This requires a huge effort from the brand in terms of money, time and people.

Education and Salon Emotion are the core assets for Redken value co-creation. Empowering hairdressers with the skills they need together with a consumer-oriented mentality, will take the utmost out advantage of what the brand is offering with a direct return on their business. Contextually, consumers can live the service as an experience capable of satisfying even their inner needs.

Being a Salon Emotion means to behave in such a way that brings the consumer to the centre, those expedients that turn the visit in the salon into a memorable experience. A place where also the shopping experience is pleasant. Retail has become a real service that can create loyalty, and as such it must be coordinated: it is influenced by the ability of the owner and his staff to establish a positive relationship with customers and transfer positive feelings. This is the ability to communicate, only obtainable through the proper education.

Finally what seems to be missing is a direct interaction between consumers and the brand. In fact, ther's a lack of suitable tools which the consumers can provide a direct feedback with, on products and experience to the brand.

5. Recommendations to Redken Italy

Based on the insights presented above, some recommendation can be derived for Redken in Italy to raise co-creation.

Education. Since the brand cannot economically sustain a wider and personalised education offer, it should focus on the growth of salons that need more attention but without neglecting the top performers salons. To bring the formers into the "*Learn Better, Earn Better, Live Better*" mind-set, Redken could use the top performers salons as brand ambassadors. The brand has salons that trusted on and follow it in a change and development path and grew through this strategy. Those salons could serve as concrete examples for others: classes could be designed to inspire through successful stories. These "emotional" sessions based on in-person testimonials on how Redken drastically change hairdressers' job and life could be an efficient tool.

On the other side, Redken should create a new job function to fulfil the needs of the salons that already achieve an important entrepreneurship level, the "*Business Coach*". This figure could fill the gap between what education is currently offering and the needs of these important customers. The Business Coach would provide "business consultations", analysing numbers of the salon together with the hairdresser, in order to build with him/her a business plan.

Redken Styling App. Augmented Reality (AR) is a phenomenon that could not be ignored anymore, especially in the beauty market. Dozens of brand have already developed their own AR Apps, to talk and engage directly with consumers. In the USA Redken sponsored an App in their website that allows consumers to virtually change the colour of their hair, but it's not brand developed and doesn't have their shades and coloration brands. In Italy, Schwarzkopf Professional has its own "*House of Color*" App, L'Oréal Professionnel has *"Style My Hair"* and Wella has *"Style Vision"*. Consumers love these apps, thanks to which they find inspiration and can save looks to be replicated inside the salon. To be innovative and edgy, as Redken wants to be, it cannot survive without such an easy tool, that gives a big support in the co-creation of the salon experience.

Website. Last but not least, Redken should upgrade its website to start filling the gap between the brand and the consumers. Implementing the possibility to rate and review products and services would enable consumers to perceive their voice heard directly by the brand. In addition, direct feedback will provide a support to the education and marketing. We think that these recommendations would perfectly fit the consumer centricity and the "*Learn Better, Earn Better, Live Better*" philosophy, providing benefits for Redken business itself with higher performing hairdressers and a bigger turnover for the brand, and enhancing the customer experience for more loyal and referral customers.

6. Word Project main limitations

Some limitations have been faced while conducting this research.

First of all, there is a limitation resulting from the samples of consumers and hairdressers interviewed. As to the formers, all the interviewees and the questionnaire's respondents were concentrated in two out of the 20 regions of Italy. On the other side, the sample of hairdressers is particularly small: we contacted more than 30 hairdressers in total, but they showed a very small availability and interest in conducting these interviews. Moreover, the Italian professional hair-care market is really fragmented with very different realities across the country, especially between the north and the south (e.g., the price of an hair-cut is two to three times cheaper in the south). In addition, the hairdressers interviewed were salon owners or were working in fancy and big salons, mostly in important city centres. Their entrepreneurial attitude clearly emerged, but as we stated, the majority of Italian hairdressers are still far below. For these reasons, the sample could not be totally representative of the real situation.

A second limitation is represented by the page limit of this work project. For hairdressers and managers we reported only the major and most significant insights; a deeper analysis would have contributed to an easier understanding of the dynamics.

Moreover, in the discussion and recommendation sections, we didn't analyse deeply the role of Marketing since in Italy, Redken is asked to follow the brand strategy developed by the *Direction Marketing International* (DMI) in Paris, which, in turn follows the global brand strategy provided by the New York headquarters. The Education and Digital teams, instead, have a much higher degree of freedom in the development of the national strategy.

Lastly, we faced a time limitation. Working at Redken with all the challenges that the Brand is facing in this quickly changing professional hair-care market, together with small structure that runs it, left us, with a limited time available in the development of this research.

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A Work Project, presented as part of the requirements for the Award of a Master Degree in Management from the NOVA – School of Business and Economics.

How the selective hair-care brand Redken in Italy can co-create both with hairdressers and consumers to build the salon experience of the future?

Appendices

Alvise Giovanni Cenere

Student number: 29656 | 3656

A Project carried out on the Master in Management Program, under the supervision of:

Professor Catherine da Silveira

Lisbon, 4th of January 2019

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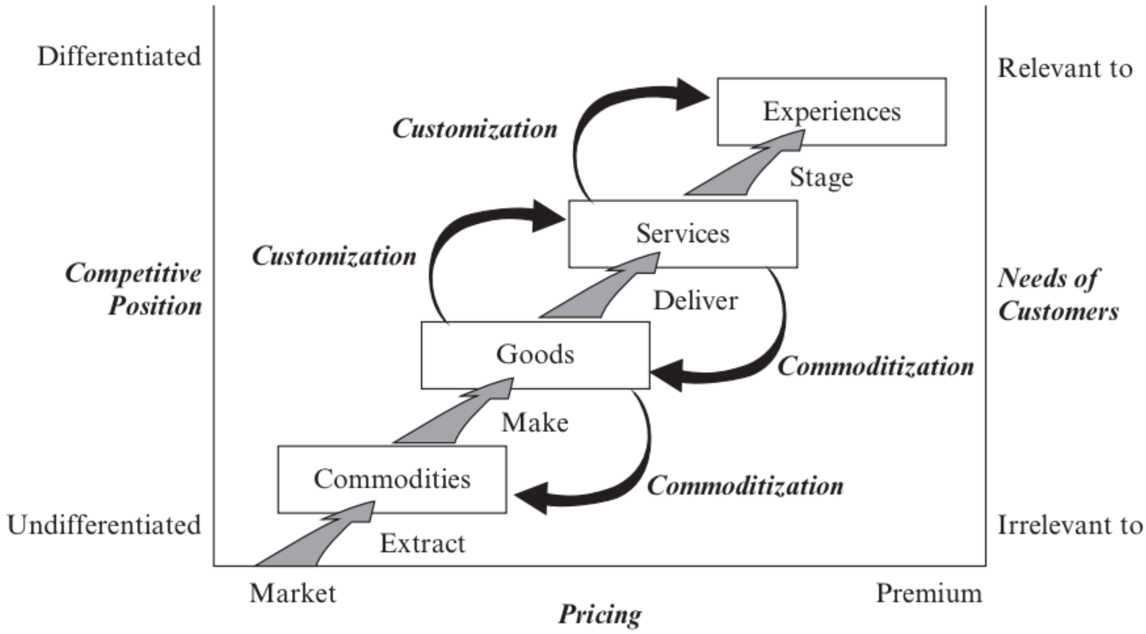
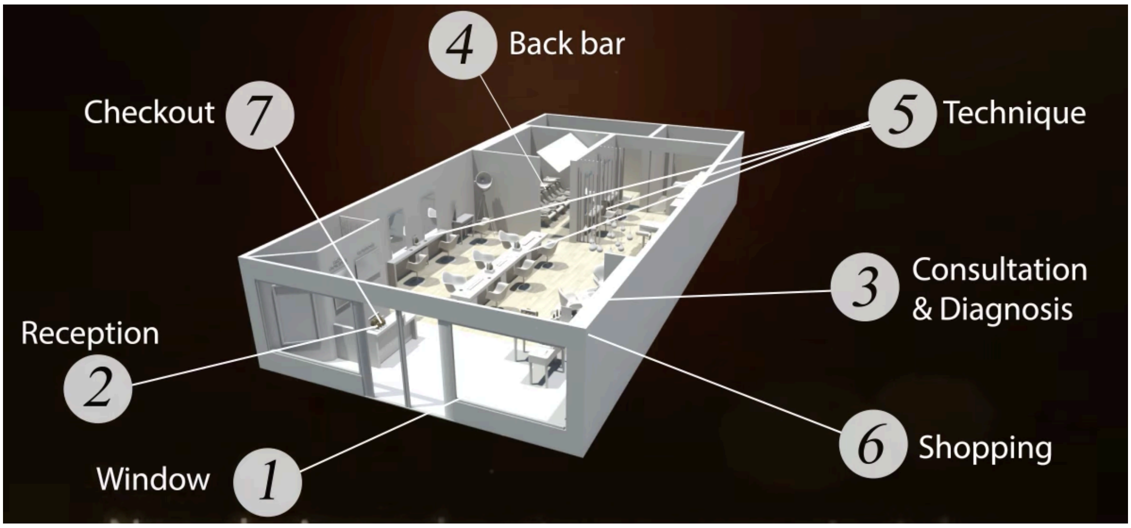
Appendix 1. The Progression of Economic Value.



Source: Pine and Gilmore (2011). p. 111.

Appendix 2. The 7 steps of Salon Emotion.



Source: L'Oréal Brandstorm (2018).

Appendix 3. Pre-recruitment Questionnaire for Consumers.

Filter 1: Are you aged between 25 and 35 years old?
If yes, proceed to filter 2.
If no, stop the interview.

Filter 2: Did you go to the hairdresser at least once in the last 3 months?
If yes, proceed to filter 3.
If no, stop the interview.

Filter 3: I am going to show you a list of brands used and sold by hairdressers. Could you please tell me which brand do you know at least the name?

[A list of brands used by hairdresser is shown. Interviewees should know at least one selective brand from L'Oreal. Table in **Appendix 5]**
If yes, proceed to filter 4.
If no, stop the interview.

Filter 4: From this list of brands, which one(s) the salon you go most uses?

[A list of brands used by hairdresser is shown. Interviewees should go to a salon that uses at least one selective brand from L'Oreal. Table in **Appendix 5**]
If yes, proceed to interview
If no, stop the interview.

Appendix 4. Pre-recruitment questionnaire for Hairdressers.

Filter 1: Contract with Redken
If yes, proceed with the interview.
If no, stop the interview.

Appendix 5. Pre-recruitment Questionnaire for Mangers.

Filter 1: Do you work at REDKEN for more that two years?
If yes, proceed to filter 2.
If no, stop the interview.

Filter 2: Does your work involve consumers somehow?
If yes, proceed with the interview.
If no, stop the interview.

Appendix 6. Consumers' Interview Guide.

Warm-up:

Good morning I'm Alvise Cenere and I'm a final year master student. This interview is part of my graduation project at NOVA School of Business and Economics and will take about 40 minutes. With your permission I would like to record the whole interview. Your identity and everything you say will be anonymized so that you cannot be identified and care will be taken to ensure that other information (as direct quotations) during the interview that could identify yourself is not revealed.

Interview guide questions and topics to explore:

Initial question:

The last time you went to a salon/hair dresser in Italy, how did you choose it and why?"

Topics to explore

- Get insights about drivers of the decision making process: price, location, loyalty, reviews and advocacy.
- Attitude: why do they go, how many times, what they usually do
- Loyalty: do they have a favourite salon or they change from time to time?
- At home and in specialists' salon: do the perception change?
- Analyse the last experience while going through the process from welcoming to payment, to find what did like and what they did not like
- Co-creation: is the hairdresser involving consumers in service improvement? And are consumers participating in the experience co-creation? How?
- Expectations: what they would like to find in terms of products, what experience they would like to live and which services they would like to find in the salon.

Respondent profile:

- Age
- Gender
- Frequency
- Level of education
- Occupation
- Average expenditure
- Professional brands bought at the hairdresser and used at home in the last 6 months

Appendix 7. Hairdressers' Interview Guide.

Warm-up:

Good morning I'm Alvise Cenere and I'm a final year master student. This interview is part of my graduation project at NOVA School of Business and Economics and will take about 40 minutes. With your permission I would like to record the interview. Your identity and everything you say will be anonymized so that you cannot be identified and care will be taken to ensure that other information (as direct quotations) during the interview that could identify yourself is not revealed.

Interview guide questions and topics to explore:

Initial question:

Could you please describe the type of consumers who go to your salon?

Topics to explore:

➢ Consumers:

- Consumers segments
- Expectations and needs of each segments
- Are consumers' expectations changing?

➢ Service and Experience:

- Learn about the current service, the process and particular action taken to maximize satisfaction and improve service
- How are the brands you are working with helping you to improve your service?
- Do and how "the voice of your consumers" is helping you to improve service?

➢ Future Trends:

- How the future of the salon experience will be

Respondent profile:

- ❖ Number of employees
- ❖ Average coloration service cost
- ❖ Location of the salon
- ❖ Salon Emotion

Appendix 8. Managers' Interview Guide.

Warm-up:

Good morning I'm Alvise Cenere and I'm a final year master student. This interview is part of my graduation project at NOVA School of Business and Economics and will take about 40 minutes. With your permission I would like to record the whole interview. Your identity and everything you say will be anonymized so that you cannot be identified and care will be taken to ensure that other information (as direct quotations) during the interview that could identify yourself is not revealed.

Interview guide questions and topics to explore:

Initial question:

How do you fell REDKEN strategy is incorporating the voice of consumers?

Topics to explore

- ➢ Get insights about how the different team are hearing the voice of consumers and hairdressers
- ➢ Explore if and how consumers are relating with the brand
- ➢ Understand the current dynamics with which consumers and hairdressers are involved in the value creation process

Respondent profile:

- ❖ Job Title
- ❖ Years at REDKEN
- ❖ Work on field

Appendix 9. List of Professional Hair care Brands shown to consumers during pre-recruitment questionnaire**.**

ALFAPARF MILANO

davines beauty + sustainability

ghd good hair day, every day

L'ORÉAL PROFESSIONNEL PARIS

WELLA PROFESSIONALS

TIGI®

AVEDA™

MARIO LORENZIN 1975

NIOXIN® RESEARCH LABORATORIES, INC.

REDKEN 5TH AVENUE NYC

OLAPLEX.

PUREOLOGY® serious colour care®

Schwarzkopf PROFESSIONAL

SYSTEM PROFESSIONAL

PAUL MITCHELL® PROFESSIONAL SALON PRODUCTS

KÉRASTASE PARIS

SHU UEMURA ART OF HAIR.

MATRIX

Appendix 10. Interview codes for consumers.

Interview Code	Information	Interview Details
Interviewee 1 Fashionista	Age: 30 Gender: Female Frequency: Colour: Once every two months Styling: Once a week Level of Education: High School Occupation: Entrepreneur Average Expenditure: 200 € / Month Professional Brands bought: Kérastase	Date: 17.11.2018 Duration: 59 minutes
Interviewee 2 Escaper	Age: 25 Gender: Female Frequency: 9 times a year Level of Education: Undergraduate Occupation: Student Average Expenditure: 100 € Professional Brands bought: Redken, Aveda, Kérastase	Date: 17.11.2018 Duration: 39 minutes
Interviewee 3 Escaper	Age: 25 Gender: Female Frequency: 9 times a year Level of Education: Graduate Occupation: Intern Average Expenditure: 120 € Professional Brands bought: Davines	Date: 18.11.2018 Duration: 46 minutes
Interviewee 4 Escaper	Age: 29 Gender: Female Frequency: 6 times a year Level of Education: Undergraduate Occupation: Manager Average Expenditure: 140 € Professional Brands bought: Kérastase	Date: 19.11.2018 Duration: 41 minutes
Interviewee 5 Simplicity Lover	Age: 26 Gender: Female Frequency: 3 times a year Level of Education: Graduate Occupation: Employee Average Expenditure: 100 € Professional Brands bought: L'Oréal Professionnel	Date: 21.11.2018 Duration: 27 minutes
Interviewee 6 Simplicity Lover	Age: 32 Gender: Male Frequency: twice a month Level of Education: High School Occupation: Freelancer Average Expenditure: 35 € each time Professional Brands bought: American Crew	Date: 22.11.2018 Duration: 21 minutes

Interviewee 7 Escaper	Age: 26 Gender: Male Frequency: 6 times a year Level of Education: Master Occupation: Employee Average Expenditure: 80 € Professional Brands bought: Shu Uemura	Date: 24.11.2018 Duration: 37 minutes
Interviewee 8 Simplicity Lover	Age: 25 Gender: Female Frequency: 3 times a year Level of Education: Undergraduate Occupation: Student Average Expenditure: 40 € Professional Brands bought: none	Date: 24.11.2018 Duration: 28 minutes
Interviewee 9 Simplicity Lover	Age: 25 Gender: Male Frequency: 12 times a year Level of Education: Master Occupation: Student Average Expenditure: 30 € Brand at home: none	Date: 26.11.2018 Duration: 24 minutes
Interviewee 10 Fashionista	Age: 25 Gender: Female Frequency: 6 times a year Level of Education: Graduate Occupation: Student Average Expenditure: 60 € Brand at home: Matrix, Biolage RAW	Date: 26.11.2018 Duration: 46 minutes
Interviewee 11 Escaper	Age: 25 Gender: Female Frequency: 5 to 8 times a year Level of Education: Graduate Occupation: Intern Average Expenditure: 90 € Brand at home: Redken	Date: 26.11.2018 Duration: 47 minutes
Interviewee 12 Fashionista	Age: 25 Gender: Female Frequency: 6 times a year Level of Education: Master Occupation: Student Average Expenditure: 110 € Brand at home: Kérastase	Date: 28.11.2018 Duration: 51 minutes
Interviewee 13 Escaper	Age: 26 Gender: Female Frequency: 4 times a year Level of Education: Graduate Occupation: Intern Average Expenditure: 150 € Brand at home: GHD	Date: 29.11.2018 Duration: 44 minutes

Interviewee 14 Escaper	Age: 30 Gender: Female Frequency: Colour every 3 months; Cut every month Level of Education: Master Occupation: Worker Average Expenditure: 80 € Brand at home: L'Oréal Professionnel	Date: 01.12.2018 Duration: 49 minutes
Interviewee 15 Escaper	Age: 25 Gender: Female Frequency: 3 times a year Level of Education: Graduate Occupation: Student Average Expenditure: 170 € Brand at home: L'Oréal Professionnel	Date: 01.12.2018 Duration: 50 minutes
Interviewee 16 Fashionista	Age: 26 Gender: Female Frequency: Once a week Level of Education: Master Occupation: Worker Average Expenditure: 20 € Brand at home: Olaplex	Date: 02.12.2018 Duration: 41 minutes
Interviewee 17 Simplicity Lover	Age: 29 Gender: Female Frequency: 8 times a year Level of Education: Master Occupation: Worker Average Expenditure: 30 € Brand at home: none	Date: 03.12.2018 Duration: 33 minutes
Interviewee 18 Fashionista	Age: Fashionista Gender: Female Frequency: 1 a month Level of Education: Master Occupation: Phd Student Average Expenditure: 60 € Brand at home: Kérastase, Redken	Date: 04.12.2018 Duration: 32 minutes
Interviewee 19 Fashionista	Age: 27 Gender: Female Frequency: every other month Level of Education: Master Occupation: Worker Average Expenditure: 80 € Brand at home: L'Oréal Professionnel	Date: 06.12.2018 Duration: 39 minutes

Appendix 11. Interview codes for Hairdressers.

Interview Code	**Information**	**Interview Details**
Hairdresser 1	Position: Salon Owner Salon Type: Unisex Number of employees: 4 Average coloration service cost: 25€ to 40€ Location of the salon: City centre of a small City Salon Emotion: No	Date: 19.11.2018 Duration: 38 minutes
Hairdresser 2	Position: Salon Owner Salon Type: Unisex Number of employees: 11 Average coloration service cost: >40 € Location of the salon: Milan City Centre Salon Emotion: No	Date: 26.11.2018 Duration: 35 minutes
Hairdresser 3	Position: Salon Owner Salon Type: Unisex Number of employees: 9 Average coloration service cost: >40 Location of the salon: Fancy area of Rome Salon Emotion: Yes	Date: 02.12.2018 Duration: 46 minutes
Hairdresser 4	Position: Employee of Hairdresser 3 Salon Type: Unisex Number of employees: 9 Average coloration service cost: >40 Location of the salon: Fancy are of Rome Salon Emotion: Yes	Date: 02.12.2018 Duration: 29 minutes
Hairdresser 5	Position: Salon Owner Salon Type: Barber Number of employees: 4 Average coloration service cost: 20 € for grey coverage Location of the salon: Milan City Centre Salon Emotion: No	Date: 16.12.2018 Duration: 22 minutes
Hairdresser 6	Position: Salon Owner Salon Type: Unisex Number of employees: 6 Average coloration service cost: >40 € Location of the salon: City Centre of a Medium Size City Salon Emotion: No	Date: 17.12.2018 Duration: 53 minutes

Appendix 12. Interview codes for Managers.

Interview Code	**Information**	**Interview Details**
Manager 1	Job Title: Education Manager Years at Redken: 8 Work on field: No	Date: 13.12.2018 Duration: 42 minutes
Manager 2	Job Title: Marketing Manager Years at Redken: 4 Work on field: No	Date: 14.12.2018 Duration: 28 minutes
Manager 3	Job Title: Product Manager Years at Redken: 2 Work on field: No	Date: 17.12.2018 Duration: 32 minutes
Manager 4	Job Title: Trade Marketing Manager Years at Redken: 4 Work on field: Yes	Date: 20.12.2018 Duration: 41 minutes
Manager 5	Job Title: Digital Manager Years at Redken: 2 Work on field: No	Date: 21.12.2018 Duration: 27 minutes

Appendix 13. Online questionnaire for consumers.

Start of Block: Filter

Q1.1 Ciao!
Mi chiamo Alvise Cenere e sono un laureando Master in Management all'università NOVA SBE di Lisbona. Sto svolgendo il mio progetto finale sull'esperienza dal parrucchiere e la cura dei capelli nel mercato Italiano. Questo questionario vuole indagare le attuali attitudini delle consumatrici e dei consumatori nei confronti del parrucchiere.

Hai voglia di condividere con me la tua esperienza?

Non preoccuparti, il questionario è completamente anonimo e non ti occuperà più di 5 minuti! :)

Te ne sarei molto grato,

Grazie,

Alvise

Q1.2 Hai tra i 25 e i 35 anni?
- Si (1)
- No (2)

Skip To: End of Survey If Hai tra i 25 e i 35 anni? = No

Q1.3 Vai dal parrucchiere?
- Si (1)

- No (2)

Skip To: End of Survey If Vai dal parrucchiere? = No

Q1.4 Sei andata/o dal parrucchiere negli ultimi sei mesi?
- Si (1)
- No(2)

Skip To: End of Survey If Sei andata/o dal parrucchiere negli ultimi sei mesi? = No

End of Block: Filter

Start of Block: Consumer's Attitudes

Q2.1 In media, quante volte vai dal parrucchiere?
- Più di una volta al mese (1)
- Una volta al mese (2)
- 6-12 volte all'anno (3)
- 2-5 volte all'anno (4)
- Una volta all'anno (5)

Q2.2 Per favore, seleziona con quale frequenza fai questi trattamenti

	Più di una volta al mese (1)	Una volta al mese (2)	6-12 volte all'anno (3)	2-5 volte all'anno (4)	Una volta all'anno (5)	Mai (6)
Colore (1)	•	•	•	•	•	•
Taglio (2)	•	•	•	•	•	•
Piega (3)	•	•	•	•	•	•
Trattamenti per la cura dei capelli (molecolare, cheratina, maschere, etc) (4)	•	•	•	•	•	•
Trattamenti permanenti (stiratura chimica, permanente, etc) (5)	•	•	•	•	•	•
Acquisto (in salone) di prodotti per capelli (6)	•	•	•	•	•	•

Q2.3 Quanto tempo spendi, in media, dal parrucchiere?
- Meno di un'ora (1)
- 1-3 ore (2)
- Più di 3 ore (3)

Q2.4 Indica, in una scala da 1 a 7, quanto sono importanti questi elementi quando vai dal parrucchiere.
(1 = per niente importante ; 7 = importantissimo)

	1 (1)	2 (2)	3 (3)	4 (4)	5 (5)	6 (6)	7 (7)
Il rapporto qualità-prezzo (1)	•	•	•	•	•	•	•
Il prezzo è ragionevole (2)	•	•	•	•	•	•	•
Un servizio personalizzato (3)	•	•	•	•	•	•	•
La puntualità del parrucchiere (4)	•	•	•	•	•	•	•
Disponibilità di altri servizi, slegati dai capelli (come farsi le unghie, il trucco, etc) (5)	•	•	•	•	•	•	•
La qualità dei trattamenti e dei prodotti (6)	•	•	•	•	•	•	•
La professionalità del parrucchiere (7)	•	•	•	•	•	•	•
Avere una relazione parrucchiere-cliente (8)	•	•	•	•	•	•	•
L'ambiente (9)	•	•	•	•	•	•	•
La possibilità di acquistare prodotti per capelli (10)	•	•	•	•	•	•	•

Q2.5 Di solito vai dallo stesso parrucchiere?

- Si (1)
- No (2)

Q2.6 Considerando i trattamenti che fai più frequentemente quando vai dal parrucchiere, quanto spendi in media?

____

Q2.7 Indica, in una scala da 1 a 7, pensi dovrebbe essere migliorato. Se non hai altro da aggiungere, in "altro" scrivi "no" e seleziona 1.
(1 = sono soddisfatto così ; 7 = assolutamente da migliorare)

	1 (1)	2 (2)	3 (3)	4 (4)	5 (5)	6 (6)	7 (7)

Il sistema di prenotazione (1)	•	•	•	•	•	•	•
Accoglienza (2)	•	•	•	•	•	•	•
Tempi di attesa (3)	•	•	•	•	•	•	•
Il parrucchiere come "consulente" (4)	•	•	•	•	•	•	•
Il parrucchiere come "amico" (5)	•	•	•	•	•	•	•
Servizi aggiuntivi: cibo e bevande (6)	•	•	•	•	•	•	•
Servizi aggiuntivi: attività di intrattenimento (libri, serie tv, musica, wifi, etc.) (7)	•	•	•	•	•	•	•
La qualità dei prodotti e dei trattamenti (8)	•	•	•	•	•	•	•
Gli orari di apertura (9)	•	•	•	•	•	•	•
L'ambiente (la comodità, l'arredamento, etc.) (10)	•	•	•	•	•	•	•
Altro (11)	•	•	•	•	•	•	•

Q2.8 Indica quanto ti ritieni d'accordo con le seguenti affermazioni
(1 = non sono d'accordo per niente; 7 = sono totalmente d'accordo)

	1 (1)	2 (2)	3 (3)	4 (4)	5 (5)	6 (6)	7 (7)
Sono soddisfatto del mio attuale parrucchiere (1)	•	•	•	•	•	•	•
Vado dal parrucchiere anche quando sono all'estero (2)	•	•	•	•	•	•	•
Mi piace che sia sempre lo stesso parrucchiere a fare i capelli (3)	•	•	•	•	•	•	•
Mi piace sperimentare trattamenti (che non rivoluzionano il mio look) (4)	•	•	•	•	•	•	•
Mi piace sperimentare trattamenti che cambiano di molto il mio look (5)	•	•	•	•	•	•	•
Vado dal parrucchiere per rilassarmi e farmi coccolare (6)	•	•	•	•	•	•	•
Non ho mai tempo di andare dal parrucchiere (7)	•	•	•	•	•	•	•
Mi piacerebbe spendere meno tempo dal parrucchiere (8)	•	•	•	•	•	•	•
Mi piacerebbe spendere più tempo dal parrucchiere (9)	•	•	•	•	•	•	•
Mi piace avere consigli dal mio parrucchiere (10)	•	•	•	•	•	•	•

Mi piace prendermi cura dei miei capelli anche a casa (ad esempio utilizzando maschere e prodotti specifici) (11)	•	•	•	•	•	•	•

End of Block: Consumer's Attitude

End of the survey